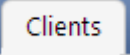
















Quick Reference Guide

Term	Definitions	Icons
Tabs	Navigational indicators of specific application areas to work in	
Entity Toolbar	Identifies which entity you are currently working with	 Smith, Jacob
Navigation Panel	Contains Favorites, Menu Items & Menu Groups	Case Management
Buttons	Re-direction links which open workflows or facilitate data entry processing	 Add New Service
Menu Items	Links that direct users to various screens	 Client Case Notes
Menu Group	Stores Menu Items by Group	 Case Management
Dashboard	Screens used to enter, search & display data	 Client Dashboard
Action Menu	Displays a list of available menu actions related to the associated line	
Edit	Edit & View Existing Records	
Find	Search for Existing Records	
Print	Print the current viewed screen	
Calendar	Displays an interactive calendar to facilitate date & task entries	
Client Intake	Workflow designed to enter new clients into the system	 Find/Add Client
Issues	Log a problem, ask a question or make a suggestion with the Support Desk	Help
Settings	Change user password, security question and display settings	Settings
Paused Operations	This menu item stores paused workflows and is located on the Home tab	 Paused Operations